

A-7 CASE STUDY: SEATTLE'S I-5 SOUTH HOV PROJECT

7.1 PROJECT DESCRIPTION

7.1.0 Impetus

The Interstate 5 (I-5) Corridor is the major north-south interstate running the entire length of Washington State. In the Puget Sound region it bisects Seattle and serves as the major roadway to and through the Metropolitan Seattle Area. The following case study focuses on the I-5 South Corridor --- the portion of I-5 to the south of Seattle between Southcenter and Federal Way (see Exhibit 7.1).

The I-5 South HOV Project occurred in response to several events. In February of 1990, Pierce Transit's Board of Directors passed a resolution which requested the Washington State Department of Transportation (WSDOT) to accelerate the opening of HOV lanes between Tacoma and Seattle. This was to assure the success of express transit service Pierce Transit had committed to begin operating in September, 1990. In addition, during this period of time a local group known as SHOVE (Southend High Occupancy Vehicle Enthusiasts) gathered over 2,000 signatures from commuters who wanted HOV lanes in South King County and North Pierce County. This petition was presented to the state's Secretary of Transportation, along with a request for HOV lanes along the corridor as soon as possible. In response, the State Transportation Commission instructed the WSDOT to perform a study to determine which sections of the corridor currently warranted HOV lanes.

After further deliberation, the Transportation Commission directed the WSDOT to pursue a project in the I-5 South Corridor that could be opened in the Summer of 1991. As a result of this directive, the I-5 South HOV lanes were opened on August 28, 1991.

7.1.1 Location

As part of a region-wide effort to improve mobility for commuters, the I-5 South Corridor has been programmed to incorporate high-occupancy vehicle (HOV) facilities by the year 2000. HOV facilities are part of a 10-year, \$200 million program to upgrade and rehabilitate I-5 South, bringing the freeway up to current design and safety standards. In 1991, WSDOT opened a HOV lane on Northbound I-5 between South 272nd Street and South 200th Street, and on Southbound I-5 between Klickitat Drive and State Route 516. Each HOV lane runs 4.5 miles long and is adjacent to the freeway general purpose lanes. When first opened only vehicles carrying three or more persons were allowed to use the HOV lanes. This designation was changed to two or more persons in 1993. The lanes are supported by park-and-ride lots and easily accessible parking locations in downtown Seattle that offer discounted rates to carpoolers.

7.1.2 Scheduling

HOV lanes along the I-5 South Corridor were being planned by the WSDOT for opening in the late 1990s. In response to public pressure, HOV lanes in both the northbound and southbound directions were opened to traffic in the summer of 1991. The accelerated construction of this temporary facility was the Department of Transportation's short term response to direction from the State Transportation Commission. Construction of the inside HOV lanes north and southbound was staged to maintain 4 lanes of general purpose traffic in both directions. By narrowing the existing 4 lanes from 12 feet to 11 feet and shrinking the median from 10 feet to 4 feet general purpose traffic was not negatively impacted through the addition of the HOV lane.

EXHIBIT 7.1

7.1.3 Utilization

Initially only vehicles carrying three or more persons were allowed to use the HOV lanes. Peak period volume data indicated that the HOV lanes in the South Corridor were being under-used. A preliminary study offered a number of reasons for this low utilization. These reasons included: bottlenecks where HOV lanes end and merge with general purpose lanes; and access to exit ramps unavailable from HOV lanes. (see report "Evaluation of Seattle's South I-5 Interim HOV Lanes" by Gary Farnsworth) To alleviate bottlenecks, changes were made by WSDOT. Rather than have the HOV lane merge into the left general purpose lane, the right lane was turned into an exit lane at the point where the HOV lane converts to a general purpose lane. It was also concluded in this evaluation that the amount of travel time savings provided by use of the HOV lanes was insubstantial during peak hour travel time. In addition, occupancy requirements for all HOV facilities in the region (with the exception of the SR- 520 Westbound HOV lane) were changed to a 2+ designation in mid-1993. An evaluation of the occupancy and operations of the lane since the change in occupancy designation has not been undertaken at this writing.

7.2 MARKETING

7.2.1 Overview

The marketing activities for the I-5 HOV Study were designed to stimulate awareness and comments from a variety of target markets associated with or having an interest in the study process and its outcome. These markets included elected officials, jurisdiction staff, employers, commuters, the media and the general public. A unique characteristic of the project was the early involvement of the general public in the process. A group of citizens, organized as SHOVE (Southend High Occupancy Vehicle Enthusiasts), gathered more than 2000 signatures from commuters who wanted HOV lanes in South King County and North Pierce County. These signatures were sent to the Secretary of Transportation, the State Transportation Commission and the chair of the Legislative Transportation Committee. Leaders of SHOVE also testified before members of the State Transportation Commission.

7.2.2 Market Research

Market research activities were utilized to support and guide the marketing plan development. A telephone survey and executive interviews were conducted as part of the market research activities of this project.

Telephone Survey

The telephone survey reflected the attitudes and opinion of 819 randomly selected residents of South King County and North Pierce County. The data provided a baseline measure of attitudes and opinions regarding HOV travel and treatments, and the potential for converting people from single occupancy vehicles to HOVs.

The following emerged from the telephone survey:

- A large number of King and Pierce County residents were highly frustrated with the level of traffic on I-5.

- A majority of King and Pierce County residents believed HOV lanes are "fairly" or "very effective" while few have personally used HOV lanes in the past.
- Respondents were moderately interested in taking actions to reduce traffic congestion. Actions which most interested respondents were reading articles about traffic congestion; taking the bus or using carpools/vanpools and distributing information to co-workers about ridesharing opportunities. They were least interested in attending meetings about ridesharing.

Executive Interviews

Executive interviews were conducted with 22 pre-selected individuals. These individuals represented a mix of political, neighborhood, and business representatives. The objectives of the interviews were to: assess attitudes regarding a variety of HOV treatments; identify opportunities for regional partnerships to build community awareness and support for this project; identify specific institutional/organizational concerns regarding this HOV project; and obtain information about the communication challenges foreseen by these individuals and in turn solicit assistance to facilitate communication during the implementation phase.

The following emerged from the executive interviews:

- **Speakers Bureau:** WSDOT officials in District One and District Three should look for opportunities to talk about the WSDOT's commitment to the HOV system.
 - **Concept Marketing:** Activities associated with general HOV marketing should be increased.
 - **Market Development Component:** A component which allows for the facilitation of employee transportation programs which would enhance the usage of HOV treatments should be considered.
 - **Program Partnerships:** A strong partnership with transit agencies and the media should be developed to strengthen bonds between public agencies, the media and the general public.

Overall communication recommendations that emerged from this research included:

- Mount an early general pro-HOV campaign before scenarios are introduced, emphasizing the strong local support by community groups and its link to a long range regional transportation program.
 - The immediacy of the I-5 HOV improvements should be repeatedly emphasized.
 - Packaging materials as "traffic information" should be considered as long as it emphasizes solutions and improvements.
 - Continue to provide accessible information to the general public, as well as targeted groups, on a steady basis.

- To achieve broader participation, mechanisms should be used which do not require a major time commitment, and which emphasize a link between participation and personal benefit to the individual.
- Communications should incorporate the following themes:
It works.
It makes public transportation cheaper and faster.
- Market segments for the project are as follows:
Travel Mode: Bus Riders, SOV, Carpool or Vanpool users
County of Residence: Pierce or King
Commute Destination: North Pierce County, South King County, or Seattle/East of Lake Washington

7.2.3 Campaign Strategy

An extensive education plan was developed to educate elected officials and key jurisdictions about the role HOV facilities play in providing mobility for the region. The education focus of the plan included: a bus tour; a kick off briefing; ongoing media relations and database management; the publication of a quarterly newsletter; and jurisdictional briefings. In addition, to promote the opening of this HOV segment a marketing plan was implemented (plan outline is attached). The marketing component included: the development of a logo (see Exhibit 7.2); transit advertising; displays; special event participation; and the development of promotional materials including posters, brochures, buttons, balloons and self-stick note pads all incorporating the logo for the project.

EXHIBIT 7.2 PROJECT LOGO

Education Actions

Bus Tour: The purpose of the bus tour was to develop an understanding of the project objectives and process among a variety of elected officials and staff of public agencies affected by the HOV facility. The tour, held on July 15, 1990, was attended by 47 participants. The tour route began in downtown Seattle and traveled south along the I-5 corridor to the Lakewood park-and-ride lot in South Pierce County, the southern terminus of the study corridor. Information about HOV facilities in general, and specific plans for HOV facilities along the corridor was presented. A leader of SHOVE was also part of the tour, and spoke on behalf of the organization.

Kick-Off Briefing: The purpose of the Kick-Off briefing was to present and discuss the objectives and work tasks of the I-5 South Interim HOV Study to WSDOT Headquarters, District One and District Three staff. Because early understanding of the project was considered essential given the fast-track timeline -- the Transportation Commission had directed WSDOT to open an HOV facility in less than one years time -- the Kick-Off briefing set the tone of partnership and cooperation which was carried out throughout the entire project.

Media Relations: Throughout the project the study team maintained contact with the media. Media relations activities focused on maintaining a heightened awareness of the study process and outcomes with targeted media representatives. This ongoing relationship resulted in positive coverage on the study in local newspapers.

Data Base Management: A database of public and private agencies, organizations and businesses who participated in any of the information gathering activities or who expressed interest in the project was developed and maintained. In addition, a complete database of all SHOVE members was maintained to facilitate the distribution of study information and updates.

Newsletter: The project team published the I-5 HOV Study Bulletin quarterly throughout the project. Each issue of the newsletter was distributed via mail, at worksites and aboard transit buses to nearly 15,000 people living or working within the corridor. Bulletin articles included information on survey results, the opening of the HOV lane, potential improvements and general information about the ongoing process of the project.

Displays/Special Events: Project information was presented and public comment solicited through displays at employment site transportation fairs, and special community-sponsored events.

Jurisdictional Briefings: Briefings were conducted with elected officials and staff representing 18 local jurisdictions and public organizations. A marketing goal of these briefings was to persuade these jurisdiction to partner with the WSDOT in the distribution of education and marketing materials. This partnering was a successful and cost-effective strategy which resulted in thousands of brochures and newsletters distributed at no distribution cost to WSDOT.

Marketing Actions

A detailed marketing implementation plan is included at the end of this case study. The following is a brief summary of the activities undertaken as part of promoting the opening of the new lanes.

Information Development: Information was developed which announced the opening of the new HOV lane and encouraged recipients to try an HOV mode. This information took a variety of forms, and included, newsletter articles, brochures, posters, flyers, transit advertising, buttons, post-a-notes and balloons.

Information Distribution: Promotional material was distributed in a variety of ways, including on-board Metro and Pierce Transit buses, at employment sites in King and Pierce counties, to residences through assistance from local jurisdictions and by members of SHOVE.

Thank-You Ride: Two weeks after the opening of the new HOV facility the chair of the Transportation Commission hosted a special "thank-you ride" for the leader of SHOVE. The chair of the commission rode with SHOVE leaders along the entire new corridor. Media representatives were also invited to provide them the opportunity to talk to SHOVE leaders and the Commissioner.

Promotion: In addition to information distributions, announcements about the pending opening were made aboard transit coaches, and signs announcing the day of opening were posted along the construction site.

Media Relations: Media relations activities included on-air interviews, talk-show interviews and day -of-opening coverage. Efforts were made by WSDOT to provide visibility for SHOVE as a leader in working to get the lanes designed and opened.

7.2.4 Marketing Materials and Budget

A variety of materials were developed and distributed which promoted the opening of the lanes and encouraged its immediate usage. These materials included:

<u>Item</u>	<u>Messages</u>	<u>Distribution</u>
What would you do with 100 hours of free time? Brochure	<ul style="list-style-type: none"> • When the HOV lanes were opening • Rules and enforcement • Join a carpool (the brochure contained an application to the region's free computerized ridematching) 	<ul style="list-style-type: none"> • Desktop by janitorial service at targeted worksites • Transit Information Centers • Commuter Information Centers (located at 500 employment sites throughout the region)
What would you do with 100 hours of free time? Poster (two sizes: 11"x17" and 28"x48")	<ul style="list-style-type: none"> • When the HOV lanes were opening • Join a carpool/ride the bus 	<ul style="list-style-type: none"> • Transit Information Centers • Commuter Information Centers (located at 500 employment sites throughout the region)
I-5 HOV Lanes transit exterior sign	<ul style="list-style-type: none"> • HOV lanes opening on I-5 in S. King County 	<ul style="list-style-type: none"> • Posted on outside of 100 buses traveling I-5 corridor in S. King County
I-5 HOV Lanes post-it-notes	<ul style="list-style-type: none"> • HOV lanes opening on I-5 in S. King County 	<ul style="list-style-type: none"> • Desktop by janitorial services at targeted worksites • Worksite transportation fairs
I-5 HOV Lanes buttons	<ul style="list-style-type: none"> • HOV lanes opening on I-5 in S. King County 	<ul style="list-style-type: none"> • Desktop by janitorial services at targeted worksites • Worksite transportation fairs

The total budget (including all consultant costs for marketing and promotion strategy development and implementation) totaled \$41,530. This budget covered all costs, including printing/production costs, postage/distribution costs and advertising/transit sign placement costs.

7.2.5 Community Reaction

SHOVE was satisfied that the needs of the community were met through the opening of the I-5 South HOV lanes. This satisfaction was evidenced by leaders of SHOVE formally thanking members of the Transportation Commission, as well as positive statements made by SHOVE leaders to the media regarding the efforts made by WSDOT to design and build the lanes swiftly. In a survey conducted by the WSDOT to gauge traveler support for the HOV facility after the opening of the lanes, nearly 80% of those surveyed who traveled the South-I-5 corridor agreed with the statement "HOV lanes are a good idea" and thought that WSDOT should extend the HOV lanes farther. Over 70% thought WSDOT should continue with the construction of HOV lanes and

only a little more than 10% of survey respondents agreed with the statement "HOV treatment is unfair to single-occupant travelers".

7.2.6 Monitoring & Evaluation

No evaluation of the marketing activities was undertaken as part of the project. However, a number of reports were written to monitor the usage of the newly opened lanes themselves. In general, it was concluded that in-and-of themselves, the lanes covered too short of a distance to persuade any substantial mode-shift to HOV. Moreover, a lack of additional transportation system management treatments such as park-and-ride lots and ramp metering hampered the success of the HOV facility. The new facility did, however, provide time-savings and travel time reliability to those who did use them. An evaluation undertaken by WSDOT estimated travel time savings of only 2 to 3 minutes. However, some users of the lanes -- particularly leaders of SHOVE -- have reported significant travel time saving of over 15 minutes on some days. (See "Community Reaction - 7.2.5" for additional information)

7.2.7 General Marketing Conclusions

As with most HOV projects, it is difficult to separate the success of the marketing activities from the success of the project. Well-designed projects where there is demand will result in facility success, whereas poorly designed projects or projects implemented in areas where there is little demand may be termed a failures. In the case of the I-5 South HOV lanes, the facility did little to contribute to Washington States goals for mobility and congestion management.

There were, however, two key elements which make the project a success from a marketing perspective:

- **Market research activities** established a baseline of depth and breadth regarding HOV understanding and support. This market research -- both telephone survey and Executive Interviews -- gave the WSDOT an understanding of the expectations their constituents had for HOV facilities. This information aided not only in the marketing messages used to promote the opening of the HOV lanes, but in the design of the facility as well.
- **The constituency-building process**, which was an integral part of the technical planning and implementation actions, established the WSDOT commitment to HOV facilities as part of the vision of the region's vision for mobility. This process of recognizing jurisdictions and community leaders as partners in the education and marketing process as well as the planning of the facility broadened the understanding and support for the specific HOV facility on I-5 in South King County.

BIBLIOGRAPHY

Executive Interviews. Pacific Rim Resources. December 13, 1990.

Public Opinion and Behavior Regarding HOV Alternatives: Volume One. Pacific Rim Resources. November 20, 1990.

Public Opinion and Behavior Regarding HOV Alternatives: Findings, Communications Strategies, Appendix. Pacific Rim Resources. November 20, 1990.

Communication Strategies. Pacific Rim Resources. December 13, 1993.

I-5 South Interim HOV Project: Final Recommendations Report. Parsons Brinckerhoff Quade & Douglas, Inc. July 8, 1991.

Evaluation of Seattle's South I-5 Interim HOV Lanes Gary Farnsworth -- WSDOT. Spring 1992.